



2026 MTD Quarterly Reporting Checklist

For UK Landlords & Sole Traders | April 6 Deadline

MTD Quarterly Reporting Checklist

STEP 1: AM I IN SCOPE? (1 min)

- 2025/26 qualifying income exceeded £50,000
- Income is expected to stay above £50,000 in 2026/27
- Income comes from self-employment and/or UK property

Score: ___ / 3

2+ ticks = MTD mandatory from April 2026

STEP 2: YOUR DEADLINES (Circle yours) (Quarterly updates — not tax payments)

- Q1: 6 Apr - 5 Jul 2026 → File by 7 Aug 2026
- Q2: 6 Jul - 5 Oct 2026 → File by 7 Nov 2026
- Q3: 6 Oct - 5 Jan 2027 → File by 7 Feb 2027
- Q4: 6 Jan - 5 Apr 2027 → File by 7 May 2027

STEP 3: ARE YOUR RECORDS READY? (2 min)

INCOME

- Income recorded when received (not invoiced)
- Late payments allocated to the correct quarter
- Void periods recorded as £0
- Void periods recorded as £0

EXPENSES

- Repairs vs improvements separated
- Mileage logged quarterly
- CIS subcontractors verified
- Home office method consistent

Score: ___ / 8



STEP 4: YOUR BIGGEST RISKS (2 min)

LANDLORDS ✓

- ❑ Late winter rents causing cash pressure
- ❑ Incorrect joint property income split
Service charges double-counted

SOLE TRADERS ✓

- ❑ Business and personal expenses mixed
- ❑ Mileage not tracked quarterly
- ❑ Inconsistent home office claims

My biggest risk: _____

STEP 5: TECH SETUP

- Xero (E2E recommended)
- QuickBooks
- FreeAgent
- ❑ You want to continue using your preferred software or spreadsheets, with HMRC-approved bridging tools.

[Contact us](#) for advice on software or bridging tools to be MTD-ready!

STEP 6: SIMPLE 30-DAY ACTION PLAN

Week 1 ❑ Free E2E MTD readiness review

Week 2 ❑ Software or bridging setup + Q1 prep

Week 3 ❑ Test quarterly submission

Week 4 ❑ Start live quarterly reporting

STEP 6: SIMPLE 30-DAY ACTION PLAN

9-11 → ✓ MTD Ready

5-8 → ⚠ At Risk

0-4 → 🚨 Urgent support needed

👉 See which [E2E MTD package](#) fits your score

